Grain Transportation Report

A weekly publication of the
Transportation and Marketing Programs/Transportation Services Branch
www.ams.usda.gov/tmdtsb/grain

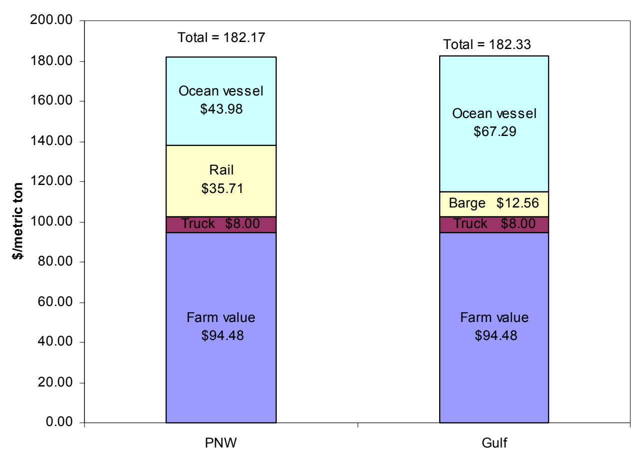
April 29, 2004

Contents

The next release is May 6, '04

Total Landed Cost of Transporting Corn from Minnesota to Japan Increases. In the first quarter of 2004, the total landed cost of shipping corn to Japan from Minnesota through the Pacific Northwest (PNW) was $182.17 per metric ton (a 10-percent increase, compared with $166.01 in the fourth quarter of 2003) and $182.33 per metric ton (a 16-percent increase, compared with $157.15 in the fourth quarter of 2003) from Minnesota through the Gulf of Mexico (Gulf) (figure 1). The total landed cost (converted to metric tons) includes[1]: the farm value of corn, truck rates, rail rates, barge rates, and ocean freight rates.

Figure 1 -- Cost of shipping corn to Japan, 1st quarter 2004



The cost of transportation through the PNW ($87.69) is 48 percent of the total landed cost, and the total transportation cost has increased by 7 percent from the fourth quarter of 2003 (table 1). The cost of transportation through the Gulf ($87.85) is 48 percent of the total landed cost, and the total transportation cost has increased 20 percent from the fourth quarter of 2003 (table 2).

Ocean freight is 50 percent of the total transportation cost of shipping corn to Japan through the PNW and is 77 percent of the cost of shipping through the Gulf (figure 1). While ocean rates are high, compared with this time last year, shipping rates are falling as China's demand for world commodities eases amid its government's efforts to cool that nation's overheating economy. More ships are also being built and are expected to come online next year. USDA and the *Wall Street Journal*, April 16, 2004. karla.martin@usda.gov

Table 1--Quarterly PNW modal comparisons

	1st qtr_'04	4th qtr_'03	Percent change
	$/metric ton		
Truck	$8.00	$7.87	2
Rail	$35.71	$34.50	4
Ocean vessel	$43.98	$39.65	11
Total	$87.69	$82.02	7

Table 2--Quarterly Gulf modal comparisons

	1st qtr_'04	4th qtr_'03	Percent change
	$/metric ton		
Truck	$8.00	$7.87	2
Barge	$12.56	$18.14	-31
Ocean vessel	$67.29	$47.15	43
Total	$87.85	$73.16	20

1st Quarter Conversion Factors[1]
1 bushel = 56 pounds of corn
1 metric ton = 39.368 bushels
1 ton = 0.9071428 MT

Farm value – $2.40 per bushel. Projected average January - March 2004 prices (2003/04 marketing year). Source: *World Agricultural Supply and Demand Estimates* (WAOB/USDA) - http://www.usda.gov/oce/waob/wasde/wasde.htm.
Truck rates – $0.20 per bushel per 100 miles. Source: Local Minnesota elevators.
Barge rates – $11.39 per ton = index*(1976 tariff benchmark rate per ton)/100. $6.19 is the 1976 tariff benchmark rate. *Twin Cities is closed from December 2003 through mid-March 2004. Source: *Grain Transportation Report,* AMS/USDA www.ams.usda.gov/tmdtsb/grain.
Rail rates – $35.71 per metric ton. Source: Tariff Rail Rates for Unit Train Shipments. www.bnsf.com.
Ocean freight rates – $43.98 (PNW) and $67.29 (Gulf) per metric ton. Source: Baltic Exchange www.balticexchange.com.

Grain Transportation Indicators

Table 1--Grain transport cost indicators*

Week ending	Truck	Rail	Barge	Ocean: Gulf	Ocean: Pacific
04/28/04	115	172	76	297	270
Compared with last week	**unchanged**	↓	↓	↓	↓

*Indicator: Base year 2000 = 100; Weekly updates include truck = diesel ($/gallon); rail = nearby secondary rail market ($/car); barge = spot Illinois River basis (index = percent of tariff rate); and ocean = routes to Japan ($/metric ton)

Source: Transportation & Marketing Programs/AMS/USDA

Table 2--Market update: U.S. origins to export position price spreads ($/bushel)

Commodity	Origin--destination	4/23/2004	4/16/2004
Corn	IL--Gulf	-0.35	-0.38
Corn	NE--Gulf	-0.48	-0.51
Soybean	IA--Gulf	-0.41	-0.36
HRW	KS--Gulf	-0.74	-0.78
HRS	ND--Portland	-1.28	-1.30

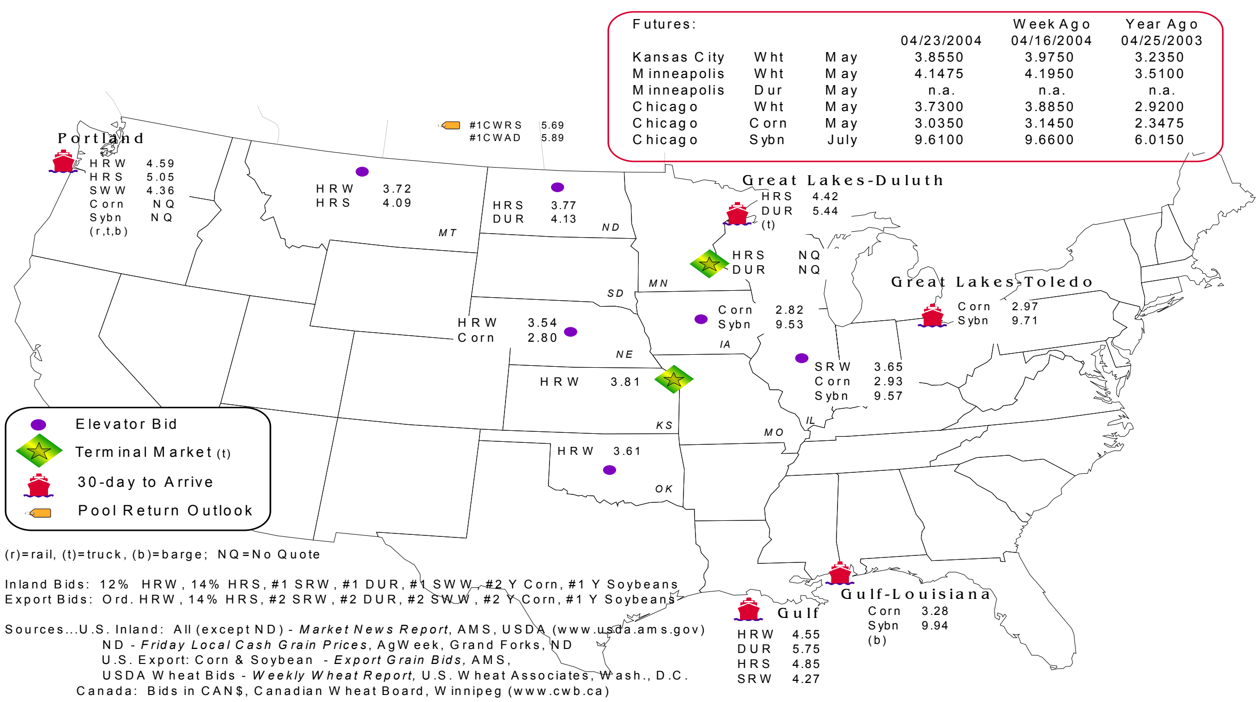
Note: nq = no quote

Source: Transportation & Marketing Programs/AMS/USDA

The **grain bid summary** illustrates the market relationships for commodities. Positive and negative adjustments in differential between terminal and futures markets, and the relationship to inland market points, are indicators of changes in fundamental market supply and demand. The map may be used to monitor market and time differentials.

Figure 1

Grain bid summary



Rail Transportation

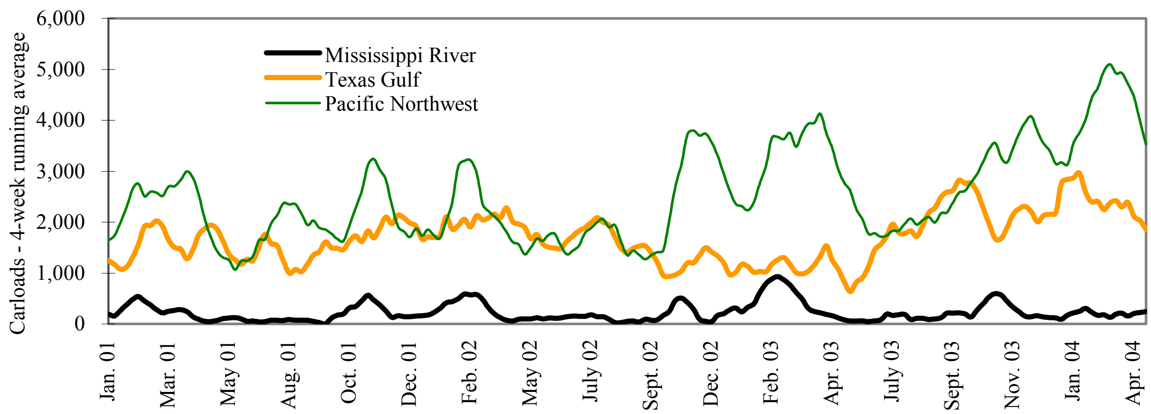
Table 3--Rail deliveries to port (carloads)*

Week ending	Mississippi Gulf	Texas Gulf	Pacific Northwest	Atlantic & East Gulf	Total
4/21/2004 p	182	1,437	3,279	0	4,898
4/14/2004 r	377	1,808	2,732	60	4,977
2004 YTD	3,392	37,751	66,575	3,387	111,105
2003 YTD	8,029	19,190	54,225	8,900	90,344
2004 as % of 2003	42	197	123	38	123
Total 2003**	14,934	88,118	150,530	20,509	274,091
Total 2002	10,937	84,625	111,832	20,842	228,236

(*) Incomplete Data; (**) Excludes 53rd week;YTD = year-to-date; p = preliminary data; r = revised data
Source: Transportation & Marketing Programs/AMS/USDA

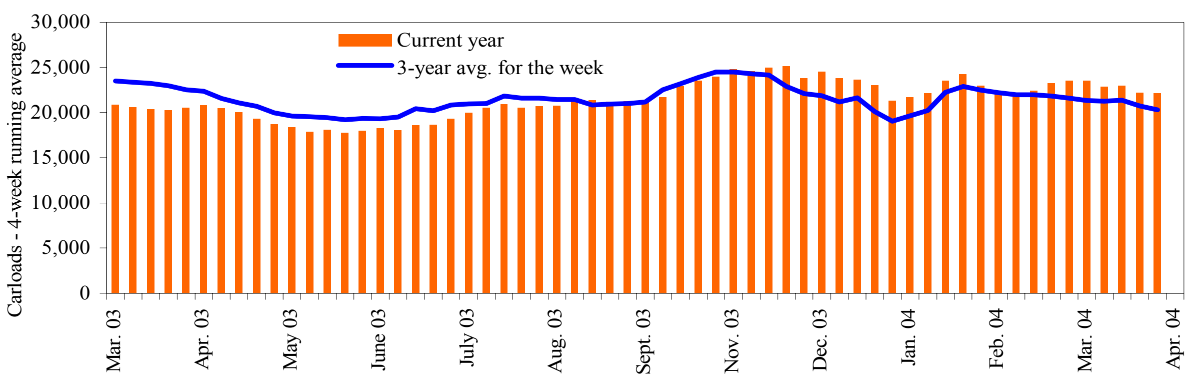
Railroads originate approximately 40 percent of U.S. grain shipments. Trends in these loadings are indicative of market conditions and expectations.

Figure 2
Rail deliveries to port



Source: Transportation & Marketing Programs/AMS/USDA

Figure 3
Total weekly U.S. grain car loadings for Class I railroads



Source: Association of American Railroads

Table 4--Class I rail carrier grain car bulletin (grain carloads originated)

	East		West			U.S. total	Canada	
Week ending	CSXT	NS	BNSF	KCS	UP		CN	CP
04/17/04	3,263	3,159	8,727	580	6,808	22,537	5,295	3,745
This week last year	2,485	3,457	7,552	230	5,722	19,446	3,232	3,385
2004 YTD	44,838	50,351	141,113	8,285	99,992	344,579	71,117	52,567
2003 YTD	43,060	48,810	118,499	5,166	97,090	312,625	51,458	53,195
2004 as % of 2003	104	103	119	160	103	110	138	99
Total 2003*	146,395	171,260	416,371	24,506	336,079	1,094,611	197,993	198,185

Source: Association of American Railroads (www.aar.org); YTD = year-to-date; * Excludes 53rd week

Table 5--Rail car auction offerings ($/car)*

Delivery for:	June 04	July 04	Aug. 04
BNSF[1]			
COT/N. grain	no offer	no offer	no offer
COT/S. grain	no offer	no offer	no offer
UP[2]			
GCAS/Region 1	no offer	no offer	no offer
GCAS/Region 2	no offer	$58	no offer

*Average premium/discount to tariff, last auction

[1]BNSF - COT = Certificate of Transportation

N includes: ID, MN, MT, ND, OR, SD, WA, WI, WY, and Manitoba, Canada.

S includes: CO, IA, IL, KS, MO, NE, OK, TX, NM, AZ, CA, UT, and NV.

[2]UP - GCAS = Grain Car Allocation System

Region 1 includes: AR, IL, LA, MO, NM, OK, TX, WI, and Duluth, MN.

Region 2 includes: CO, IA, KS, MN, NE, WY, and Kansas City and St. Joseph, MO.

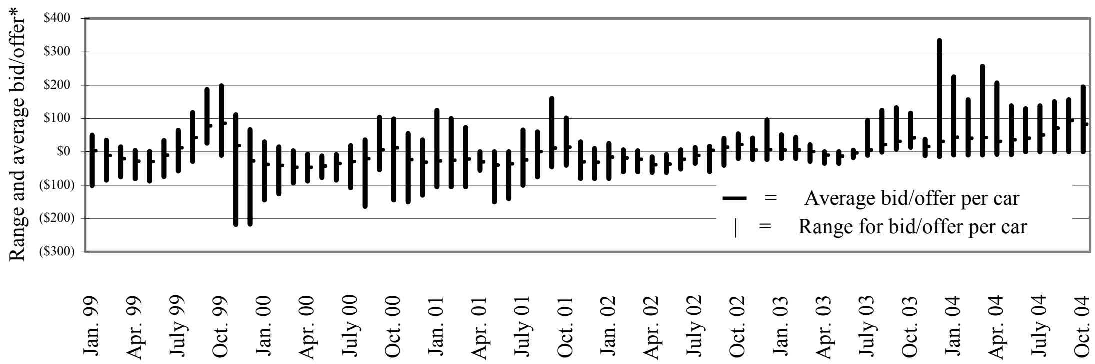
Source: Transportation & Marketing Programs/AMS/USDA

Rail service may be ordered directly from the railroad via **auction** for guaranteed service or tariff for nonguaranteed service or through the secondary market.

The **secondary rail market** information reflects trade values for service that was originally purchased from the railroad carrier as some form of guaranteed freight. The **auction and secondary rail** values are indicators of rail service quality and demand/supply.

Figure 4

Secondary rail car market, delivery month-year



*up to 6 months of trading

Source: Transportation & Marketing Programs/AMS/USDA

Average bid/offer is the simple average of all the weekly bids/offers over the entire period (up to 6 months) for guaranteed railcars that are traded for delivery in a particular month.

Range for bid/offer shows the range of average weekly bids/offers over the entire period (up to 6 months) for guaranteed railcars that are traded for delivery in a particular month.

Table 6--Weekly secondary rail car market ($/car)*

	Delivery period			
Week ending	**June 04**	**July 04**	**Aug. 04**	**Sep. 04**
BNSF-GF				
4/23/2004	$61	$79	$129	$154
Change from last week	-$4	$3	$24	$6
UP-Pool				
4/23/2004	$93	$104	$144	$155
Change from last week	-$25	-$34	-$6	-$1

*Average premium/discount to tariff, $/car-last week

Note: Bids listed are market INDICATORS only & are NOT guaranteed prices,
Missing value = no bid quoted; GF = guaranteed freight; Pool = guaranteed pool

Sources: Transportation and Marketing Programs/AMS/USDA

Data from Atwood/ConAgra, Harvest States Co-op, James B. Joiner Co., Tradewest Brokerage Co.

Table 7--Tariff rail rates for unit and shuttle train shipments*

Effective date: 4/5/2004	Origin	Destination	Rate/car	Rate/metric ton	Rate/bushel**
Unit train*					
Wheat	Minneapolis, MN	Houston, TX	$2,020	$22.27	$0.61
	Kansas City, MO	Galveston, TX	$1,820	$20.06	$0.55
	Minneapolis, MN	Portland, OR	$4,148	$45.72	$1.24
	St. Louis, MO	Houston, TX	$1,945	$21.44	$0.58
	Kansas City, MO	Laredo, TX	$2,280	$25.13	$0.68
	Chicago, IL	Albany, NY	$1,834	$20.22	$0.55
	Chicago, IL	Richmond, VA	$1,961	$21.62	$0.59
Corn	Minneapolis, MN	Portland, OR	$3,240	$35.71	$0.91
	Chicago, IL	Baton Rouge, LA	$2,736	$30.16	$0.77
	Council Bluffs, IA	Baton Rouge, LA	$2,170	$23.92	$0.61
	Evansville, IN	Raleigh, NC	$1,841	$20.29	$0.52
	Council,Bluffs, IA	Stockton, CA	$3,496	$38.54	$0.98
	Kansas City	Dalhart, TX	$1,745	$19.24	$0.49
	Columbus, OH	Raleigh, NC	$1,750	$19.29	$0.49
	Des Moines, IA	Laredo, TX	$2,930	$32.30	$0.82
Soybeans	Minneapolis, MN	Portland, OR	$3,310	$36.49	$0.99
	Chicago, IL	Baton Rouge, LA	$2,736	$30.16	$0.82
	Council Bluffs, IA	Baton Rouge, LA	$2,799	$30.85	$0.84
	Des Moines, IA	Laredo, TX	$2,930	$32.30	$0.88
	Evansville, IN	Raleigh, NC	$1,841	$20.29	$0.55
	Chicago, IL	Raleigh, NC	$2,441	$26.91	$0.73
Shuttle Train*					
Wheat	St. Louis, MO	Houston, TX	$1,795	$19.79	$0.54
	Minneapolis, MN	Portland, OR	$3,993	$44.01	$1.20
Corn	Fremont, NE	Houston, TX	$2,425	$26.73	$0.68
	Minneapolis, MN	Portland, OR	$3,090	$34.06	$0.87
Soybeans	Council Bluffs, IA	Houston, TX	$2,255	$24.86	$0.63
	Minneapolis, MN	Portland, OR	$3,110	$34.28	$0.87

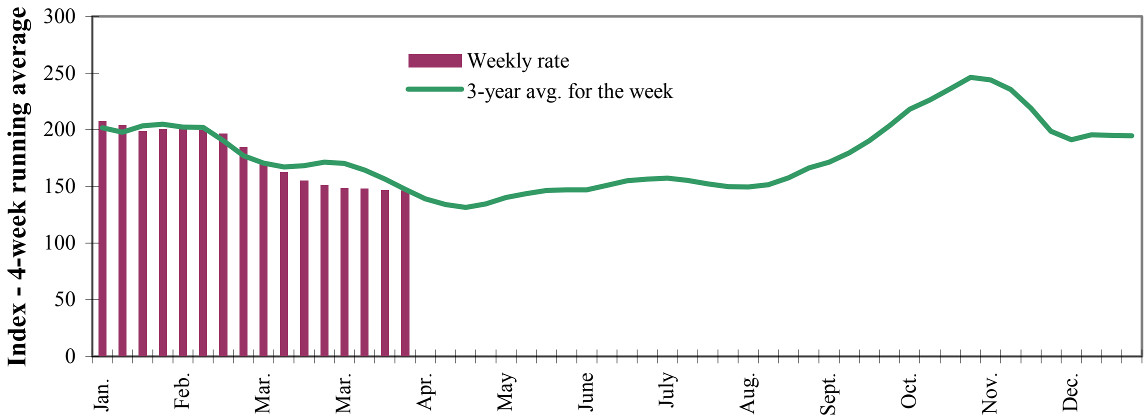
*A unit train refers to shipments of at least 52 cars. Shuttle train rates are available for qualified shipments of more than 100 cars that meet railroad efficiency requirements.

**Approximate load per car = 100 short tons: corn 56 lbs./bu., wheat & soybeans 60 lbs./bu.

Sources: www.bnsf.com, www.cpr.ca, www.csx.com, www.uprr.com

Barge Transportation

Figure 5
Illinois River barge rate index - quotes



Note: Index = percent of tariff rate

Source: Transportation & Marketing Programs/AMS/USDA

The **Illinois River barge rate index** averaged 183 percent of the **benchmark tariff rates** between 1999 and 2001, based on weekly market quotes. The **index**, along with **rate quotes** and **futures market** bids are indicators of grain transport supply and demand.

Table 8--Barge rate quotes: southbound barge freight

Location	4/21/2004	4/14/2004	May '04	July '04
Twin Cities	173	180	178	185
Mid-Mississippi	143	151	148	162
Illinois River	140	146	142	151
St. Louis	113	115	116	135
Lower Ohio	113	116	118	139
Cairo-Memphis	109	110	111	135

Index = percent of tariff, based on 1976 tariff benchmark rate

Source: Transportation & Marketing Programs/AMS/USDA

Figure 6
Benchmark tariff rates

Calculating barge rate per ton:
(Index * 1976 tariff benchmark rate per ton)/100

Select applicable index from market quotes included in tables on this page. The 1976 benchmark rates per ton are provided in map (see figure 6).

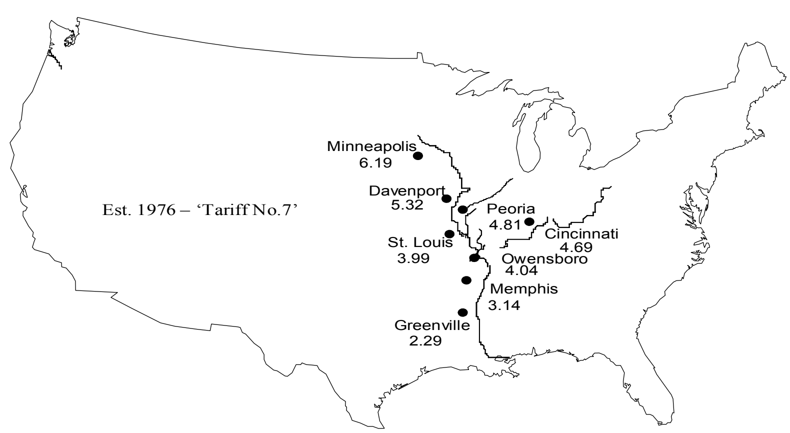


Table 9--Barge futures market (US$)*

Week ending	River/region	Contract period	Index rate Futures	Index rate Cash
4/27/2004	St. Louis	May	n/a	130
		July	n/a	140
		Sep.	n/a	205
		Nov.	n/a	185
		Dec.	n/a	153
	Illinois River	May	n/a	143
		July	n/a	153
		Sep.	n/a	218
		Nov.	n/a	215
		Dec.	n/a	178

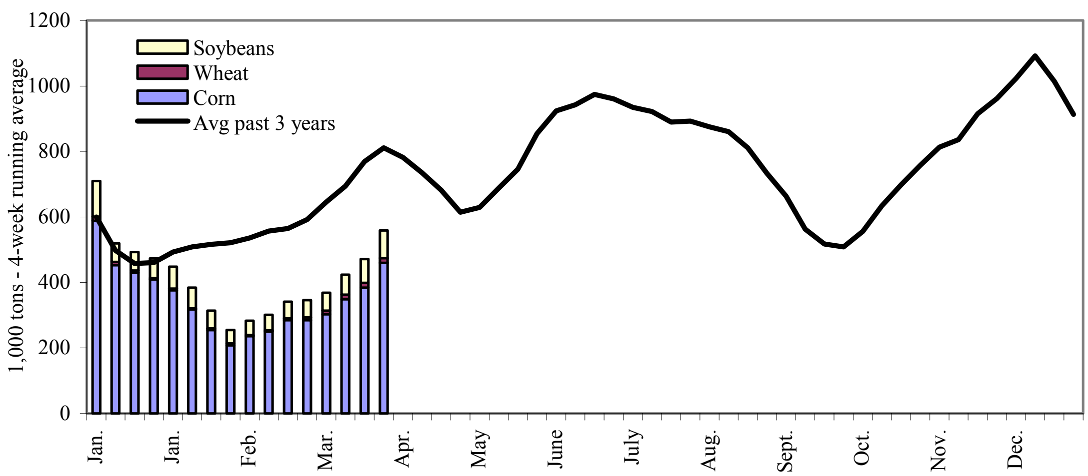
*Southbound barge freight nominal/cash basis values (US$)

Note: Index = percent of tariff, based on 1976 tariff benchmark rate

Source: Merchants Exchange of Chicago (www.merchants-exchange.com)

Figure 7

Barge movements on the Mississippi River (Lock 27 - Granite City, IL)



Source: Transportation & Marketing Programs/AMS/USDA

Table 10--Barge grain movements (1,000 tons)

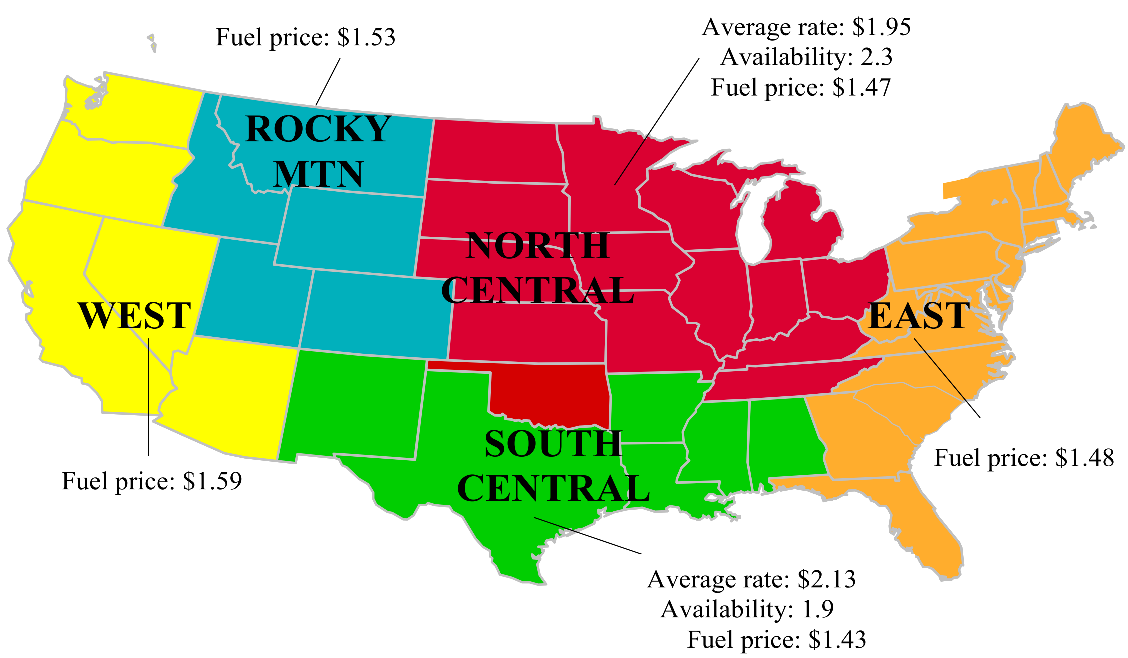
Week ending 04/17/04	Corn	Wheat	Soybean	Total
Mississippi River				
Rock Island, IL (L15)	182	2	30	214
Winfield, MO (L25)	346	3	58	407
Alton, IL (L26)	568	14	76	659
Granite City, IL (L27)	546	14	70	631
Illinois River (L8)	173	3	20	197
Ohio River (L52)	15	11	11	44
Arkansas River (L1)	0	43	1	44
2004 YTD	7,046	792	1,946	10,051
2003 YTD	7,813	536	3,297	12,004
2004 as % of 2003 YTD	90	148	59	84
Total 2003	29,898	2,787	9,146	42,526

YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1.

Source: U.S. Army Corp of Engineers (www.mvr.usace.army.mil/mvrimi/omni/webrpts/default.asp)

Truck Transportation

Figure 8
U.S. grain truck market advisory, 4th quarter 2003*



*Average rate per loaded mile, based on truck rates for trips of 25, 100, and 200 miles
Note: Fuel prices are a quarterly average (unit per gallon)
Fuel price data source: Energy Information Administration, U.S. Department of Energy, www.eia.doe.gov

Table 11--U.S. grain truck market overview, 4th quarter 2003

Region/commodity*	Rate per mile ($)			Truck availability	Truck activity	Future truck activity
				Rating compared to same quarter last year		
	25 miles	100 miles	200 miles	1=Very easy to 5=Very difficult	1=Much lower to 5=Much higher	
National average[1]	**2.58**	**1.72**	**1.56**	**2.2**	**3.2**	**2.7**
North Central region[2]	2.56	1.71	1.59	2.3	3.1	2.9
Corn	2.59	1.67	1.62	2.1	3.2	2.6
Wheat	2.30	1.66	1.52	2.7	2.8	2.9
Soybean	2.65	1.76	1.78	2.0	3.1	2.5
South Central region[2]	2.93	1.78	1.67	1.9	3.6	1.9
Corn	3.13	1.86	1.70	2.3	3.3	2.5
Wheat	2.81	1.77	1.67	1.6	3.6	1.6
Soybean	2.93	1.73	1.65	1.8	3.8	1.6

Rates are based on trucks with 80,000 lb weight limit
*Commodity averages based on truck rates for top producing states based on National Agricultural Statistics Service/USDA
[1]National average includes: AR, CO, IA, IL, IN, KS, LA, MN, MS, ND, NE, OH, OK, OR, SD, TX, and WA.
[2]Commodity rates per mile include the average of the top 3 producing states within the region.
Source: Transportation and Marketing Programs/AMS/USDA

The weekly **diesel price** provides a proxy for trends in U.S. truck rates. Diesel fuel is a significant expense for truck grain movements, accounting for 37 percent of the estimated variable cost.

Table 12--Retail on-highway diesel prices*, week ending 04/26/04 (US$/gallon)

Region	Location	Price	Change from Week ago	Change from Year ago
I	East Coast	1.655	-0.010	0.090
	New England	1.755	-0.002	0.093
	Central Atlantic	1.736	-0.006	0.075
	Lower Atlantic	1.611	-0.013	0.095
II	Midwest	1.670	-0.009	0.182
III	Gulf Coast	1.634	-0.005	0.215
IV	Rocky Mountain	1.876	0.041	0.338
V	West Coast	2.103	-0.009	0.543
	California	2.247	-0.013	0.646
Total	U.S.	1.718	-0.006	0.210

*Diesel fuel prices include all taxes.

Source: Energy Information Administration/U.S. Department of Energy (www.eia.doe.gov)

Grain Exports

Table 13--U.S. unshipped export balances (1,000 metric tons)

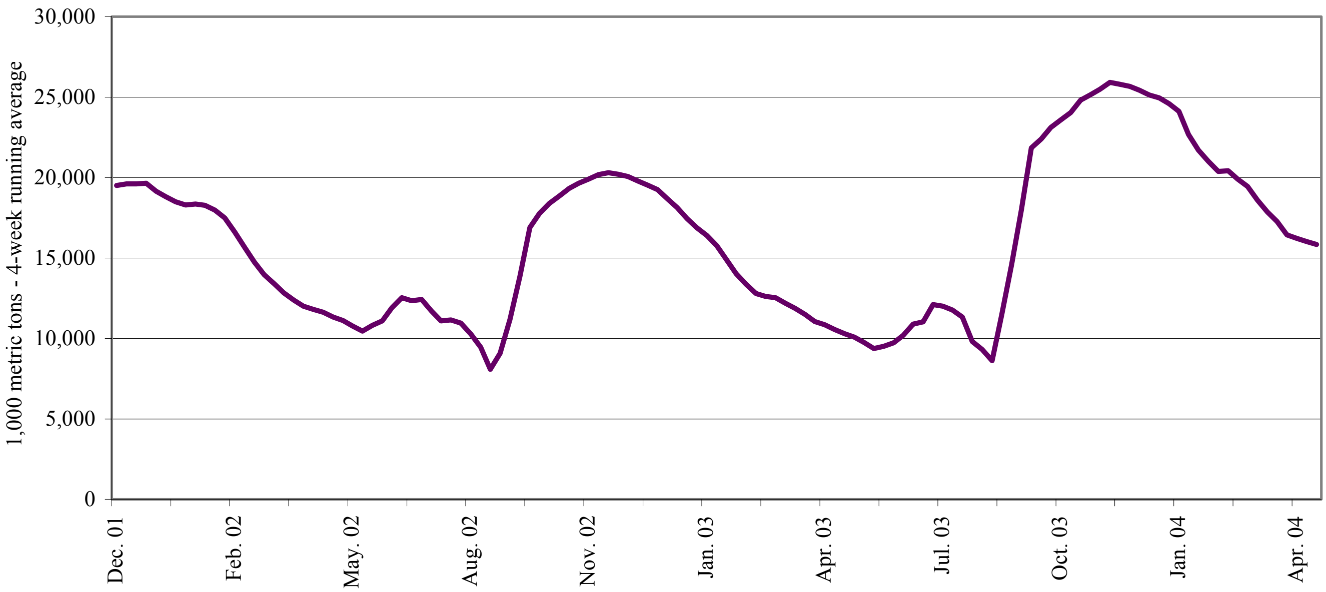
	Wheat						Corn	Soybeans	Total
Week ending	HRW	SRW	HRS	SWW	DUR	All wheat			
4/15/2004	1,832	697	1,208	674	85	4,495	9,657	1,801	15,953
This week year ago	9,126	224	1,083	487	105	2,814	5,152	2,679	10,645
Commulative exports-crop year									
2003/04 YTD	11,207	3,266	5,814	4,397	953	25,636	30,619	22,054	78,309
2002/03 YTD	6,231	2,648	5,703	3,132	642	18,357	25,283	24,515	68,155
2003/04 as % of 2002/03	180	123	102	140	148	140	121	90	115
2002/03 Total	6,896	2,899	6,645	3,517	720	20,677	39,646	28,908	89,231
2001/02 Total	8,704	5,485	5,554	3,127	1,133	24,003	47,460	29,838	101,301

Note: YTD = year-to-date. Crop year: wheat = 6/01-5/31, corn & soybeans = 9/01-8/31

Source: Foreign Agricultural Service/USDA (www.fas.usda.gov)

Figure 9

U.S. grain, unshipped export balance, including wheat, corn, and soybean sales



Source: Foreign Agricultural Service/USDA (www.fas.usda.gov)

Table 14--Select U.S. port regions - grain inspections for export (1,000 metric tons)

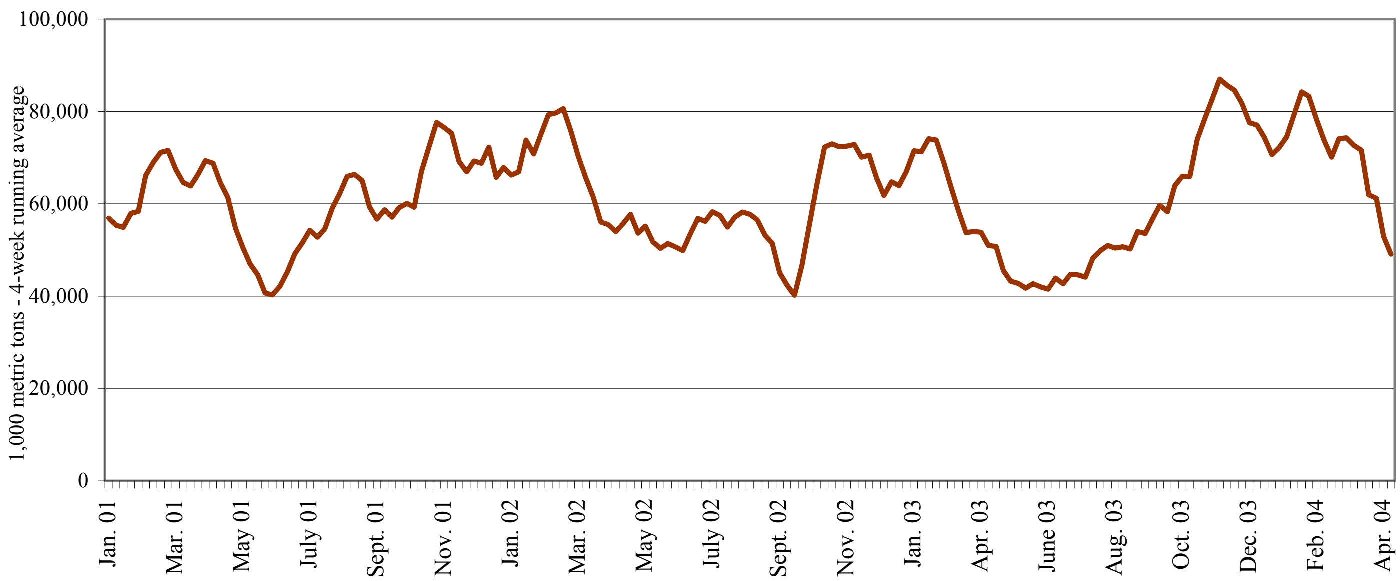
	Pacific Region			Mississippi Gulf			Texas Gulf			Port Region total		
Week ending	Wheat	Corn	Soybeans	Wheat	Corn	Soybeans	Wheat	Corn	Soybeans	Pacific	Mississippi	Texas
04/22/04	311	101	6	230	466	53	145	6	0	419	748	150
2004 YTD	3,793	3,216	1,645	2,422	10,933	5,257	3,401	49	7	8,654	18,612	3,457
2003 YTD	2,541	1,893	2,161	1,488	8,560	8,384	1,378	526	50	6,596	18,432	1,954
2004 as % of 2003	149	170	76	163	128	63	247	9	14	131	101	177
2003 Total	8,764	5,450	5,114	5,855	30,352	18,972	7,032	746	103	19,328	55,179	7,880

Source: Federal Grain Inspection Service/USDA (www.usda.gov/gipsa); YTD: year-to-date

The United States exports approximately one-quarter of the grain it produces. On average, it includes nearly 45 percent of U.S.-grown wheat, 35 percent of U.S.-grown soybeans, and 20 percent of the U.S.-grown corn. Over 60 percent of these U.S. export grain shipments departed through the Mississippi Gulf region in 2003.

Figure 10

U.S. grain inspected for export, including wheat, corn, and soybeans



Source: Federal Grain Inspection Service/USDA (www.usda.gov/gipsa)

Ocean Transportation

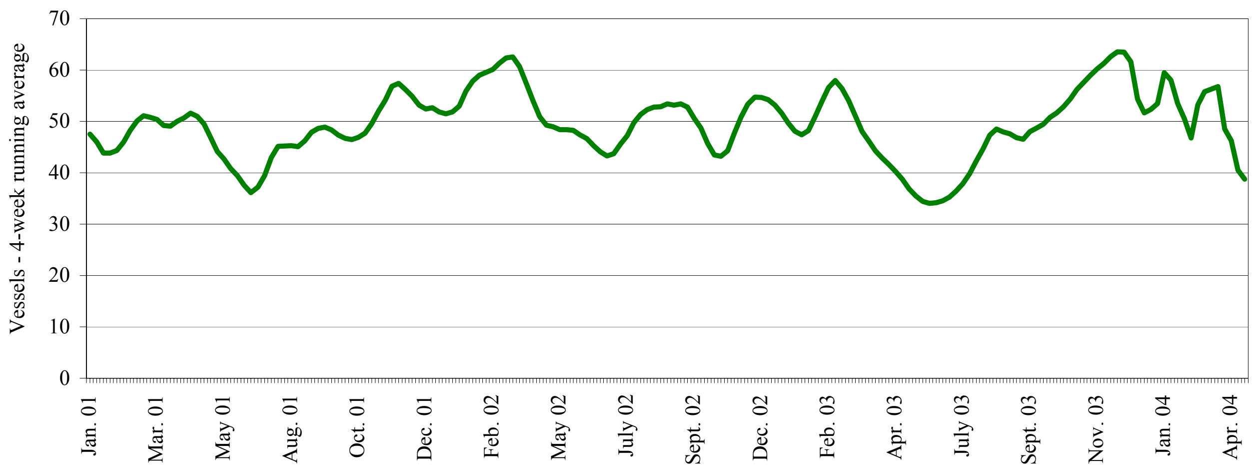
Table 15--Weekly port region grain ocean vessel activity (number of vessels)

	Gulf			Pacific Northwest	Vancouver B.C.
Date	In port	Loaded 7-days	Due next 10-days	In port	In port
4/22/2004	17	40	45	7	5
4/15/2004	14	28	46	9	4
2003 range	(11..47)	(30..76)	(39..93)	(3..13)	(1..15)
2003 avg.	31	49	62	9	6

Source: Transportation & Marketing Programs/AMS/USDA

Figure 11

Gulf Port grain vessel loading (past 7 days)



Source: Transportation & Marketing Programs/AMS/USDA

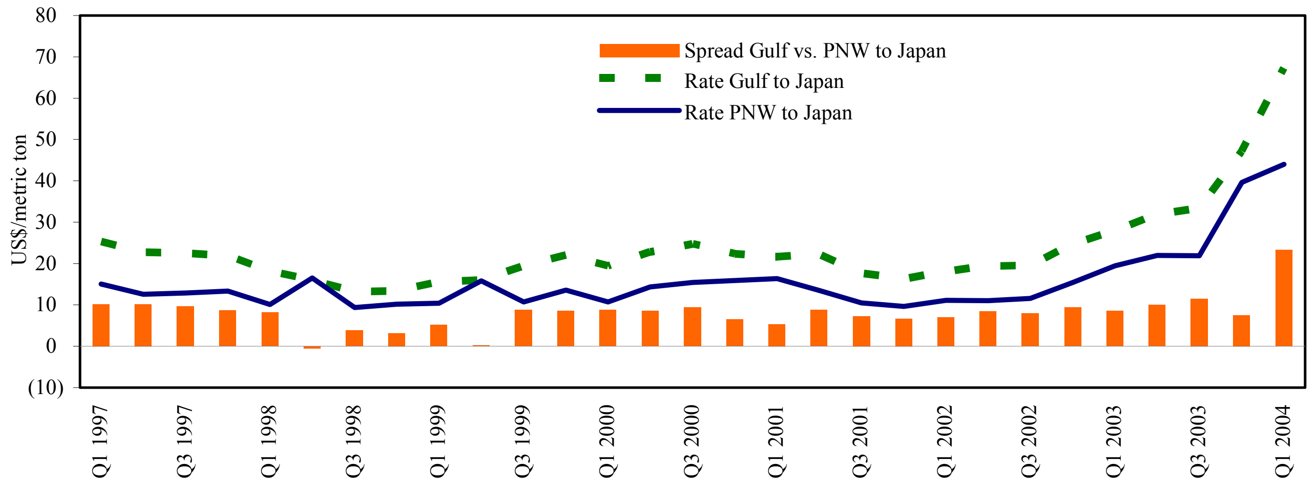
Table 16--Quarterly ocean freight rates (average rates & percentage changes) (US$/metric ton)

Countries/ regions	2004 1st qtr	2003 1st qtr	Percent change	Countries/ regions	2004 1st qtr	2003 1st qtr	Percent change
Gulf to				**Pacific NW to**			
Japan	$73.75	$27.91	164	Japan	---	$19.43	---
Taiwan	$68.00	$26.50	157				
N. Europe	---	$14.50	---	**Argentina/Brazil to**			
N. Africa	$46.25	---	---	N. Africa	$61.17	$25.35	141
Med. Sea	$46.50	$14.50	221	Med. Sea	---	$25.35	---

Source: Maritime Research, Inc. (www.maritime-research.com)

Figure 12

Grain vessel rates, U.S. to Japan



Source: Baltic Exchange (www.balticexchange.com)

Table 17--Ocean freight rates for selected shipments, week ending 04/24/04

Export region	Import region	Grain	Month	Volume loads (metric tons)	Freight rate ($/metric ton)
U.S. Gulf	Tanzania*	Maize & Sorghums	Spot	38,870	104.90
U.S. Gulf	Turkey	Wheat	Apr. 15/25	55,000	52.00
PNW	S. Korea	Corn	Spot	38,000	76.75
U.S. Gulf	Jordan	Hvy grain	Apr. 15/25	50,000	66.50
U.S. Gulf	Albania*	Wheat	Apr. 1/10	9,000	106.34
St. Lawrence	Morocco	Wheat	Apr. 10/20	21,000	45.00
Spain	Venezuela	Wheatflour Bggd	Apr. 1/10	4,800	59.50
River plate	Algeria	Corn	Apr. 5/10	24,000	62.25
River plate	Adriatic	Grains	Apr. 10/20	50,000	62.50
River plate	China	Grains	Apr. 15/20	55,000	87.50

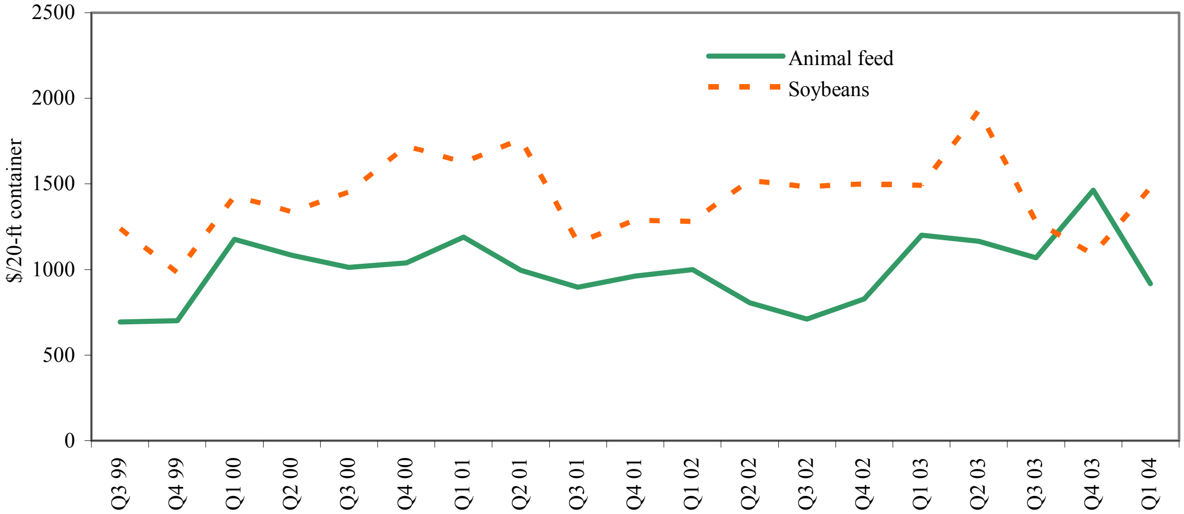
Rates shown are for metric ton (2,204.62 lbs. = 1 metric ton), F.O.B., except where otherwise indicates; op = option

*Most food aid from the United States is required to be shipped on U.S. flag vessels. The vessels are limited in availability resulting in higher rates. In addition, destinations receiving food aid generally lack adequate port unloading facilities, requiring the vessel to remain in port for a longer duration than normal.

Source: Maritime Research Inc. (www.maritime-research.com)

Figure 13

Weighted average rates[1] for containerized shipments of animal feed and soybeans to selected Asian countries



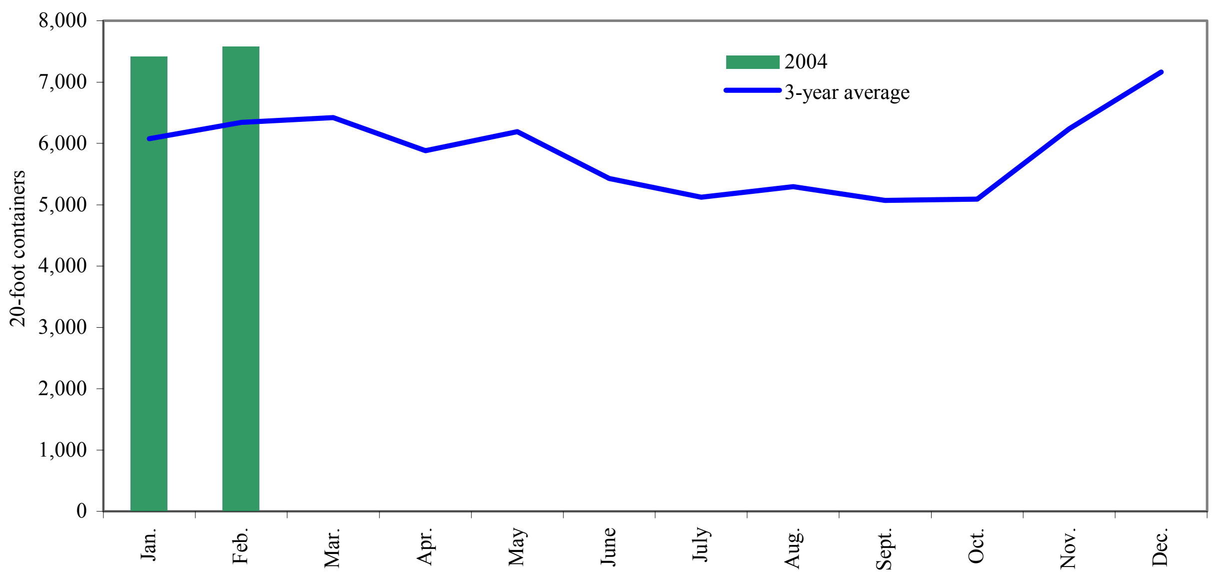
[1]Animal Feed: Busan-Korea (7%), Kaohsiung-Taiwan (46%), Tokyo-Japan (47%),
and soybeans: Bangkok-Thailand (2%), Busan-Korea (12%), Hong Kong (25%), Keelung-Taiwan (24%), Tokyo-Japan (37%)
January 2004.

Source: Ocean Rate Bulletin, Transportation & Marketing Programs/AMS/USDA

Container ocean freight rates – average rate per twenty-foot equivalent unit (TEU) weighted by shipping line market share and trade route.

Figure 14

Monthly shipments of containerized grain for 2004 compared with a 3-year average



Note: PIERS data is available with a lag of approximately 40 days

Source: Port Import Export Reporting Service (PIERS), *Journal of Commerce.*

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Related Websites

Agricultural Container Indicators – a Quarterly Report http://www.ams.usda.gov/tmd2/agci/
Ocean Rate Bulletin http://www.ams.usda.gov/tmd/Ocean/index.asp